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## WORLD WOOL PRODUCTION 1946 AND PRELIMINARY 1947

World wool production is now at the lowest level since 1935. Stocks of wool which accumulated during the war, however, are still unusually large although about 10 percent less than a year ago.

Output fell to 3,670 million pounds in 1947, according to preliminary estimates which is 2 percent below 1946 and 6 percent below the average for the years 1936-40. Production is now about on a level with the 1931-35 period. Approximately 78 percent of the world total or 2,850 million pounds in 1947 is apparel wool, the remainder being carpet type wool. Uncertainty concerning future wool prices in the United States, exceedingly unfavorable weather in the United Kingdom and drought effects in important Southern Hemisphere producing countries are mainly responsible for the expected decline in 1947.

Wool is grown on every Continent and production follows closely the trend in sheep numbers <sup>1/</sup>, but the quality and the yield per fleece varies, depending on the breed of sheep and weather and feed conditions during the growing period. The wool-surplus-producing Continents are: Oceania, South America, Africa and Asia. The highly industrialized Continents of North America and Europe and the Soviet Union are deficit areas.

TABLE I. World Wool Production and its Distribution  
in the Northern and Southern Hemispheres, 1931 - 1947 <sup>1/</sup>

Year	: Southern Hemisphere:	: Northern Hemisphere:	: World	::	Year	: Southern Hemisphere:	: Northern Hemisphere:	: World
:	Million Pounds	:	:	::	:	Million Pounds	:	:
1931	: 2,140	: 1,580	: 3,720	::	1940	: 2,450	: 1,730	: 4,180
1932	: 2,230	: 1,500	: 3,730	::	1941	: 2,480	: 1,720	: 4,200
1933	: 2,130	: 1,500	: 3,630	::	1942	: 2,480	: 1,680	: 4,160
1934	: 2,060	: 1,480	: 3,540	::	1943	: 2,520	: 1,620	: 4,140
1935	: 2,090	: 1,510	: 3,600	::	1944	: 2,390	: 1,550	: 3,940
1936	: 2,140	: 1,550	: 3,690	::	1945	: 2,290	: 1,490	: 3,780
1937	: 2,130	: 1,640	: 3,770	::	1946	: 2,270	: 1,460	: 3,730
1938	: 2,180	: 1,710	: 3,890	::	1947	: 2,250	: 1,420	: 3,670
1939	: 2,360	: 1,710	: 4,070	::	:	:	:	:
:	:	:	:	::	:	:	:	:

<sup>1/</sup> Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research and other information.

<sup>1/</sup> See FLM 6-47, May 12, 1947, World Sheep Numbers in 1946 and 1947.

WOOL: Production in specified countries, greasy basis, 1/1  
 averages 1931-35 and 1936-40, annual 1939-1947

Continent and Country	Average		1939	1940	1941	1942	1943	1944	1945	1946	1947
	1931-35	1936-40									
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
<b>North America</b>											
Canada	17.3	15.6	15.2	14.9	15.3	16.5	17.8	19.3	19.6	19.0	18.0
<b>United States -</b>											
Shorn	366.3	360.6	361.7	372.0	387.5	388.3	378.8	338.3	307.9	279.9	255.0
Pulled	64.3	64.7	64.5	62.0	65.8	66.7	65.2	73.5	70.5	61.3	60.0
Total	431.1	425.3	426.2	434.0	453.3	455.0	444.0	411.8	378.4	341.2	315.0
Estimated total 3/	452.2	451.7	452.2	459.8	479.6	482.5	472.8	442.2	409.2	371.4	344.2
<b>Europe</b>											
Albania	4.2	4.4	4.1	4.1	3.9	3.8	3.9	4.2	4.4	4.8	4.8
Bulgaria	26.8	28.7	29.5	26.3	29.3	28.2	23.4	19.3	18.1	20.0	24.0
Eire	18.4	17.2	17.4	16.7	16.4	15.9	15.3	15.9	16.1	14.5	13.8
Estonia	1.9	2.4	2.6	2.0	1.5	0.9	-	-	-	-	-
Finland	2.3	2.3	2.0	2.1	1.7	1.6	1.8	2.2	2.5	2.6	2.7
France	36.9	37.1	36.4	32.8	31.4	27.0	26.9	26.0	25.0	26.5	28.6
Germany	30.5	39.8	42.4	42.7	42.8	43.9	45.7	49.9	-	-	-
Greece	17.7	19.3	18.7	18.3	16.9	15.3	11.4	9.3	11.2	13.1	15.1
Hungary	11.4	12.9	11.2	10.1	12.6	13.0	8.6	8.2	2.3	2.5	2.8
Italy	31.0	30.4	31.7	32.2	32.4	31.1	26.7	23.4	23.8	24.7	27.0
Latvia	4.2	5.9	6.3	6.3	6.0	5.5	-	-	-	-	-
Lithuania	3.7	3.6	3.5	3.6	3.8	3.2	-	-	2.4	2.7	2.8
Netherlands	2.9	3.1	3.4	2.8	2.5	2.8	2.2	2.4	6.1	5.8	6.0
Norway	5.8	5.9	5.9	5.9	5.8	5.8	5.8	-	-	-	-
Poland	9.9	11.8	-	-	-	-	-	-	15.8	17.6	18.0
Portugal	15.8	16.3	16.7	17.5	18.0	18.5	17.1	16.7	-	-	-
Rumania	53.9	50.3	52.0	51.4	-	-	-	-	81.5	79.0	77.0
Spain	68.9	70.0	73.0	84.0	83.2	78.9	83.5	88.8	86.6	90.5	75.0
United Kingdom	113.8	110.1	112.7	114.0	91.2	92.3	90.4	-	-	-	-
Yugoslavia	30.7	34.7	35.5	34.5	-	-	-	-	-	-	-
Estimated total 6/	499.0	514.0	525.3	526.3	495.4	479.8	459.4	451.4	408.6	415.9	409.9
<b>Soviet Union</b>	159.6	272.0	300.0	300.0	300.0	290.0	260.0	245.0	250.0	260.0	270.0
<b>Asia</b>											
Iran	38.0	36.3	38.6	36.4	35.3	28.6	27.5	27.7	28.7	29.5	29.0
Iraq	18.5	21.6	24.0	23.0	22.5	17.0	21.0	22.0	23.0	24.2	24.2
Syria and Lebanon	11.1	10.7	10.2	11.9	9.7	9.6	10.0	12.0	13.6	14.3	14.3
Turkey	41.4	67.7	74.2	73.4	73.5	67.3	62.0	67.0	70.0	64.0	44.0
Afghanistan	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0
China I/	90.0	88.0	85.0	85.0	85.0	85.0	85.0	75.0	75.0	75.0	75.0
India	71.9	72.9	74.0	80.5	81.0	83.0	80.0	76.0	75.0	80.0	83.0
Estimated total 8/	218.1	344.2	353.1	357.3	354.1	337.7	332.5	326.8	332.5	314.3	316.8

[illegible]

1/ Wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and Salvador. 4/ Includes Southern Dobrudja. 5/ Data for years 1939 through 1946 not on a comparable basis with prewar and 1947. 6/ Includes estimates for countries producing 2 million pounds or less, namely Austria, Belgium, Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. 7/ Includes China Proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkestan). 8/ Includes estimates for Cyprus, Palestine, Trans-Jordan and Custer Mongolia. 9/ Estimates of the Bueneo Aires Branch, First National Bank of Boston. Earlier years adjusted on the basis of actual exports. 10/ Estimates based on production in Rio Grande do Sul, which produces about 80 percent of the total. 11/ Based on recent surveys of the Junta Nacional de la Industria Lanar. 12/ Estimates of the Camara Mercantil de Productos del Pais (Mercantile Exchange of Uruguay). 13/ Includes relatively small production in Bolivia, Colombia, Ecuador, Falkland Islands, Paraguay and Venezuela. 14/ Union of South Africa, Union Protectorates and South West Africa. 15/ Includes estimates for Kenya, French West Africa and Togo, and Libya. 16/ Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, and other information. Estimates for countries having changed boundaries have been adjusted to prewar boundaries except as noted.

World production began to increase following the declaration of war in Europe and reached an all time peak of 4,200 million pounds in 1941. It continued at a high level through 1943 and then began to decline. The wartime increase was chiefly in the United States and in the important surplus producing countries of the Southern Hemisphere, and was in response to high prices for wool and meat.

The decline which began in 1943 was due to several factors. Increased costs of production, higher returns from other farm products than for wool and threatening surpluses of competitive foreign wools were contributing factors in the decline in the United States and Canada. Severe drought caused reductions in Australia and the Union of South Africa, the other two most important fine wool producing countries besides the United States. In Europe and in Asia sheep numbers and wool production were fairly well maintained until 1942 when a gradual reduction set in, which became more marked in Europe in 1945 as a result of intensified warfare.

Stocks of apparel wool still on hand on June 30, 1947, principally from wartime clips, are expected to total 4,500 million pounds, grease basis, or about 10 percent less than a year earlier, according to an estimate released at the recent International Wool Conference at London. The bulk is British Dominion wool. Approximately 45 percent remains in Government ownership compared with about half last year. The United Kingdom Wool Disposals, Ltd., (J.C.) was expected to have on hand about 1,590 million pounds of British Dominion wool and the United States Commodity Credit Corporation about 450 million pounds, all domestic grown wool.

The 1946-47 wool selling season in the British Dominions and in London was characterized by heavy sales at high prices, particularly for fine wools. This is encouraging for fine wool growers, especially since world production of fine wool is at a low level. Production in the 3 chief producing countries, Australia, the Union of South Africa and the United States, is estimated at only 1.5 billion pounds compared with 1.9 billion pounds in 1941 and an average of 1.7 billion pounds for the years 1936-40.

#### SOUTHERN HEMISPHERE

The Southern Hemisphere will produce about 2,250 million pounds in 1947-48, according to early indications, or about 1 percent less than in 1946-47. Shearing will not become general for about 4 months and the final outcome depends on how sheep come through the winter months (June-August). Therefore, only a forecast of 1947-48 production is possible at the present time.

The Southern Hemisphere now produces over 3/5 of the total world production of wool and is more important in the world supply than before the war when it produced 57 to 59 percent of the total. Notwithstanding a decline since 1943 of 11 percent, production in the Southern Hemisphere equals the average for the years 1936-40 and is 6 percent larger than the average for 1931-35.

The wartime purchase by the United Kingdom of the wool clips of Australia, New Zealand and the Union of South Africa for the duration and one clip thereafter stabilized prices at a higher level and encouraged a sharp increase in production in the early war years. Higher prices for mutton and wool also brought about an increase in Argentina and Uruguay.

TABLE III. Wool Production in 10 Leading Producing Countries and the World, 1931 - 1947  
(Million Pounds)

Year	Predominantly Apparel Wool					Predominantly Carpet Wool					Totals	
	Australia	New Zealand	Union of South Africa	Argentina	Uruguay	United States	United Kingdom	Soviet Union	China	India	Ten Countries	World
	1/	1/	2/	3/	3/				4/			5/
1931	1,007.5	269.5	305.1	364.0	106.0	442.4	112.5	212.0	90.0	72.3	2,981.3	3,720.0
1932	1,062.6	277.1	319.4	364.0	110.2	418.1	118.5	152.0	90.0	72.0	2,983.9	3,730.0
1933	995.9	289.6	275.2	364.0	104.7	438.3	119.9	141.0	90.0	72.0	2,890.6	3,630.0
1934	1,015.4	265.0	210.0	348.0	119.0	429.3	112.3	135.0	90.0	72.5	2,796.5	3,540.0
1935	971.1	304.2	237.8	365.0	113.0	427.5	105.6	158.0	90.0	70.9	2,843.2	3,600.0
1936	982.8	302.9	264.0	374.0	116.2	419.4	103.8	200.0	90.0	70.0	2,923.1	3,690.0
1937	1,023.4	296.8	233.0	366.0	116.3	422.3	104.2	260.0	90.0	69.7	2,981.7	3,770.0
1938	983.6	327.7	248.0	399.0	125.4	424.4	115.8	300.0	90.0	69.7	3,083.6	3,890.0
1939	1,127.7	310.0	246.2	443.0	133.9	426.2	112.7	300.0	85.0	74.0	3,258.7	4,070.0
1940	1,141.8	331.5	270.5	474.0	139.0	434.0	114.0	300.0	85.0	80.5	3,370.3	4,180.0
1941	1,167.2	345.0	260.0	494.0	117.0	453.3	91.2	300.0	85.0	81.0	3,393.7	4,200.0
1942	1,151.2	340.0	250.0	510.0	124.0	455.0	92.3	290.0	85.0	83.0	3,380.5	4,160.0
1943	1,169.0	330.0	250.0	520.0	147.9	444.0	90.4	260.0	85.0	80.0	3,376.3	4,140.0
1944	1,017.5	372.0	234.0	500.0	156.6	411.8	86.8	245.0	75.0	76.0	3,174.7	3,940.0
1945	930.0	365.0	210.0	500.0	175.2	378.4	86.6	250.0	75.0	75.0	3,045.2	3,780.0
1946	970.0	350.0	195.0	470.0	175.7	341.2	90.5	260.0	75.0	80.0	3,007.4	3,730.0
1947	970.0	325.0	190.0	485.0	180.0	315.0	75.0	270.0	75.0	83.0	2,968.0	3,670.0

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research and other information.

1/ Season beginning July 1. 2/ Includes Union Protectorates and South West Africa. 3/ Season beginning October 1.

4/ Excludes Outer Mongolia. 5/ Rounded to tens of millions - Includes estimate for Outer Mongolia.

The coming clip 1947-48 in Australia will probably not differ greatly from the 1946-47 clip placed at 970 million pounds, which was 4 percent above the preceding season's small production.

With the exception of northern New South Wales and the state of Queensland, weather and feed conditions were good throughout most of Australia in 1946 and early 1947. Drought developed in these densely populated sheep areas, in the last half of 1946 and early 1947 but was definitely broken by good rains in February and March 1947. By the middle of April, or about 6 months before general shearing, the seasonal outlook was reported as generally satisfactory in all sheep areas.

Notwithstanding the smaller number of sheep shorn in 1946-47, the average weight of fleece was heavier than in 1945-46, when it fell to 7.61 pounds per sheep and lamb shorn compared with a preceding 5-year average of 8.1 pounds.

The estimated increase in the 1946-47 wool production above the preceding season also is supported by the increase of 5 percent in receipts at selling centers through March 1947.

New Zealand production in 1947-48, for marketing in the coming season is forecast at 325 million pounds, a decrease of 8 percent compared with 1946. Production has declined from the record output of 372 million pounds in 1944 but is still 4 percent above the 1936-40 average.

The chief reason for the decline since 1944 was drought in the summer of 1945-46 (January-March) and unusually heavy slaughter of ewes in the 1945-46 and 1946-47 seasons. Another reason for the liquidation of ewes and the decrease in wool production may be that the world demand has been chiefly for superior fine wools and the wartime stocks of New Zealand wool, chiefly medium crossbred, have not been materially reduced. Also prices for these types have not risen as much as anticipated.

The Union of South Africa is one of the three most important fine wool producing countries, coming next after Australia and the United States. Production has shown a downward trend since 1940. Drought has been the chief cause and not much, if any, increase may be expected in the next few years because of the soil conservation program which includes as part of its program a reduction of sheep and cattle numbers to improve pastures.

Drought conditions have been particularly severe in the eastern part of Cape Province but were broken by heavy rains in February and March. The 1946-47 clip in the Union was officially estimated at 195 million pounds and a further reduction to 190 million pounds is forecast for 1947-48. Current high prices for fine wool and the smaller world production of fine wools, however, may tend to encourage production and nullify the conservation program to a certain extent.

Argentina and Uruguay are the two largest wool producing countries of South America and consume a small percentage of production. About 68 percent of production is classed as apparel wool. They are included in the five most important Southern Hemisphere exporting countries along with Australia, New Zealand and the Union of South Africa.

Argentina produces 63 percent of the South American total and comes next to Australia as the world's largest producing country. A small increase is forecast for 1947 compared with the slightly reduced estimate of 470 million pounds for 1946. Production remains at a high level and although 7 percent below the record clip of 1943 is 18 percent larger than the 1936-40 average and shows an even larger increase over the 1931-35 average.

The smaller sheep numbers and wool production in 1946-47 was the result of a smaller lamb crop in 1946 and death losses due to unfavorable weather. A heavy liquidation of ewes was also reported from April through July 1946. By July 1947 sheep numbers were expected to show some recovery.

Argentina produces chiefly fine and medium crossbred, but about 32 percent of the clip consists of coarse crossbred and criolla wool, suitable for carpets and similar purposes. Immediately prior to the war, the United States was filling a larger and larger share of its import requirements for coarse wools from Argentina. Large shipments of coarse wool from Argentina were made to the United States following the war but at present stocks are accumulating in Argentina and the Bank of the Nation has resolved to grant loans on coarse wools of the 1946 and 1947 clips. Much of the wartime accumulations was shipped out in 1945-46 but current clips of these wools are accumulating again.

Wool production in Uruguay has risen to record levels along with sheep numbers and the 1947 clip is expected to show a further increase to 180 million pounds which is 2 percent above 1946.

Production is now 43 percent above the 1936-40 average. Disposals have been slow this season and stocks are accumulating. Indications are that the increase in sheep numbers and wool production may have reached the peak.

The other two important wool producing countries of South America, Brazil and Chile, have shown slight decreases from the high levels reached during the war. Production in Brazil is estimated at approximately 39 million pounds. The main sheep and wool producing state is Rio Grande do Sul, in the extreme south. This state furnishes about 80 percent of total production. The next most important area is Northeast Brazil with Central Brazil, which is chiefly cattle country, accounting for only 3½ percent of the total.

The bulk of Brazilian production is fine and medium crossbred with about 20 percent described as coarse crossbred. Over 80 percent of the output is consumed by domestic mills. Brazil exports some wool but is not an important exporting country.

Wool production in Chile is forecast at 32 million pounds for 1947 which is about equal to the 1936-40 average. Chile normally markets its export surplus in the United Kingdom but during the war years it was marketed in the United States by agreement between the United Kingdom and the United States. A little over 70 percent of the production is normally exported. The export wool is chiefly fine crossbred from Magallanes in the extreme south and about 31 percent of the clip consists of this kind. The remaining wool is chiefly medium crossbred.

## NORTHERN HEMISPHERE

Northern Hemisphere production has shown a downward trend since 1941. In 1947 it fell to 1,420 million pounds or 18 percent below 1940, and was also smaller than the average for 1936-40 and 1931-35. All the important wool producing areas in the Northern Hemisphere now produce less wool than in 1941. The Soviet Union, China and India produce large quantities of carpet wool and only very approximate estimates are available for these areas.

The Northern Hemisphere produces a little over 1/3 of the world's total production but contains all the important wool consuming countries, the United States, the United Kingdom, France, Germany, Italy, Belgium and the Soviet Union.

### North America:

Production has been declining in the United States, the most important producing country in North America and in the Northern Hemisphere. Shorn and pulled wool production in 1947 is forecast at 315 million pounds, a decrease of 31 percent compared with the peak year 1942. The number of stock sheep fell to a new low level of 32.5 million head as of January 1, 1947 which was 9 percent below 1946. Based on this decrease, shorn wool production is forecast at 255 million pounds for 1947. In addition it is indicated that about 60 million pounds will be pulled from slaughtered sheep. The official estimate for 1946 placed total production at 341 million pounds, which was the smallest since 1933.

The decrease in wool production in the United States for the current year is a continuation of the decline in output that occurred in the previous 4 years. This decline is attributed to a rise in ranch operating costs, unavailability of suitable labor, more attractive returns in competitive enterprises and uncertainty of future wool prices.

The United States is one of the world's largest producers of apparel wool but requires imports in order to meet consumption demands. In the years 1936-40, imports of apparel wool averaged 118 million pounds annually or 21 percent of domestic mill consumption whereas during the war period, 1941-1945, imports rose to a little over 640 <sup>1</sup>/<sub>million</sub> pounds, while consumption exceeded 1 billion pounds. Imports in 1946 continued large owing principally to the heavy purchases of British Dominion wool in 1945-46. Early 1947 imports are smaller than in 1946.

The United States produces no carpet wool and imports for that purpose are entered free of duty. These imports averaged 130 million pounds in the years 1936-40. In addition about 8 million pounds of dutiable carpet wool were imported during this period.

### Canada:

A further decrease in wool production is indicated in Canada for 1947 but the output will still be above the average for the years 1936-40. The production of shorn and pulled wool is placed provisionally at 18 million pounds or 5 percent below the official estimate of 19 million pounds in 1946.

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1/ Exclusive of wool entered as an act of International courtesy for the British stockpile all of which, except 30 million pounds, had been reexported by December 1946 and the remainder will be reexported.

Sheep numbers and wool production increased materially during the war when farmers were aided by wartime subsidies. These government aids have been discontinued although some of the provinces may continue their share of the subsidy. Shorn wool production has declined about 14 percent from the peak year 1944 when it reached 15.1 million pounds but the production of pulled wool has increased as a result of heavy liquidations of sheep in the past 3 years. No indication of a reversal of the downward trend in production is indicated at the present time.

The Dominion government has recently refused to establish a floor price for wool and the decision to discontinue the bonus for clean wool may accelerate the liquidation of flocks.

The Canadian Wool Board, which purchased the domestic clip, at fixed prices from 1942 through 1946 ceased to operate December 31, 1946 and the 1947 clip will be sold on the open market.

Canada is not a large producer of wool and must import to meet requirements.

#### Europe:

The United Kingdom is normally the most important wool producing country in Europe, followed by Spain, Rumania, France, Germany and Italy. The bulk of the wool, roughly 72 percent, is apparel type wool but a small proportion of coarse carpet type wool is produced in many European countries. While exact percentages are not available, the proportion of coarse wool is small in the United Kingdom (principally Scotch Blackface), France, Germany and Spain, but larger in Eire, Italy, Portugal, and still larger in the countries of southeastern Europe.

Wool production in the United Kingdom fell off heavily in 1947 due to adverse weather conditions during the winter and spring months. Blizzards and later floods caused heavy losses of ewes and lambs. Production is provisionally estimated at only 75 million/pounds which is 17 percent below 1946 and 32 percent smaller than the average for the years 1936-40. The full extent of the losses sustained will not be known until the June sheep estimate becomes available.

Sheep numbers and consequently wool production suffered during the war because of the necessity of plowing up land for food crops. After World War I sheep and wool production did not regain prewar levels for 12 years.

The United Kingdom consumes more wool than any country except the United States and produces normally only about 16 percent of requirements. Imports into the United Kingdom in 1946 totaled 475 million pounds compared with an average of 911 million pounds for the years 1936-40. The British Dominions, Australia, New Zealand and the Union of South Africa supplied 96 percent of total imports in 1946 compared with an average of 78 percent for the years 1936-40. Not all of the wool imported is consumed in the United Kingdom. Continental and other buyers attend the sales held in the United Kingdom at London and other centers and in the years 1936-40, 22 percent of the quantity imported was re-exported, principally to France, Belgium, Germany, Soviet Union and Poland. The United Kingdom also exports domestic wool. A fair proportion of these domestic exports consist of Scotch Blackfaced carpet wool. Exports of wool from the United Kingdom are very small --, however, compared with imports and averaged about 40 million pounds annually before the war. The bulk of the United Kingdom wool entering the United States is carpet wool (Scotch and Welsh wools).

Wool production in France in 1947 is estimated at 28.6 million pounds, an increase of 8 percent above 1946 but materially below the 1936-40 and 1931-35 averages. The long-time trend in sheep numbers and in wool production is downward.

The immediate cause of reduced sheep and wool production is the shortage of feed and the priority use of feedstuffs for cattle, horses and hogs. The long-time downward trend is stated to be the result of expansion of wool growing in the Southern Hemisphere and the inability of domestic wool to compete with the lower priced foreign wools. A contributory cause for the downward trend was the intensification of French agriculture which reduced the area formerly used for sheep. Another factor is the steady decrease in trained shepherds during the past 30 years. At present the Ministry of Agriculture has instituted a program for training shepherds in an effort to encourage sheep raising.

France is the second most important wool consuming country in Europe, coming next after the United Kingdom. Before the war France produced only about 10 percent of requirements.

France has been an important purchaser of fine wool both at London and in the Dominions during the season just closing. Large purchases of Dominion wools were also made in 1945-46. Imports in 1946 totaled 574 million pounds compared with the 1931-35 average of 549 million pounds.

Wool production in Spain has decreased along with sheep numbers during the past 3 years and the drought in 1946 accelerated the decline. Production is now estimated at about 77 million pounds, compared with 88 million in 1944 and an average for the years 1936-40 of 70 million pounds.

The recommended program for sheep and wool, according to recent official studies, appears to be a reduction in sheep numbers to 18 million head from the present 19.5 million and to increase the average yield of fleece up to 6 to 6.6 pounds per head compared with the present average of 4 pounds. Difference in feed is apparently the chief cause for variation in fleece weights of animals of the same breed produced in different parts of the country according to the chief veterinary inspector.

Spain is the home of the Spanish merino, which fathered the world's most important merino flocks, especially those of Australia. In 1944, pure blood merino sheep represented only about 1/5 percent of the total number in Spain. The merino does not hold a higher place in Spanish agriculture at present because meat and milk are of more economic importance than wool. Thus, Spain has a considerable number of medium woolled sheep. The sheep producing this wool are magnificent animals as producers of meat and the ewes are good milkers, producing early lambs which gain (9 to 10 kg.) 20 to 22 pounds in 40 days and in 4 months equal their mother in size. The wool produced by these sheep is immediately inferior to merino but enjoys a preference by part of the wool industry for its length, resistance and yield.

Italy shows a slight increase in sheep and wool production since 1945. Current production is estimated at 27 million pounds, an increase of 9 percent above 1946 but 11 percent below the average for 1936-40 and 13 percent below 1931-35. Production fell to low levels during the war but has shown an increase of 15 percent since 1944.

Roughly a little over 60 percent of the wool produced in Italy is apparel wool, the remainder, produced chiefly in the South of Italy and the Islands, is coarse wool suitable for carpets and similar purposes.

Italy produces only about 25 percent of consumption requirements of raw wool. Imports averaged 65 million pounds of raw wool for the years 1936-40 compared with 143 million pounds in 1931-35.

Before the war Italy produced large quantities of the cheaper goods and was able to compete advantageously in the British market because of subsidized production.

Sheep and wool production in Eire declined to 13.8 million pounds in 1947, a decrease of 5 percent compared with 1946. Many sheep are reported to have perished in the recent severe weather.

Approximately 1/4 of wool production in Eire is estimated to be carpet wool. Normally the United States is one of the principal markets for these wools but present prices are stated to be too high.

Further decreases are indicated for Germany and Poland. Before and during the war, sheep numbers and wool production were increasing in Germany. Production in the countries of Southeastern Europe suffered heavily as the result of the war and in 1945 production in the six countries, Albania, Bulgaria, Greece, Hungary, Rumania and Yugoslavia, fell to approximately 67 percent of the 1939 total. Some recovery has been made in the past two years and production is now about 22 percent above 1945. The largest increases occurred in Bulgaria, Yugoslavia and Greece, with only slight increases in Hungary, Rumania and Albania.

Production estimates for French North Africa have undergone revisions on the basis of the latest information. A fairly large percentage of sheep in these nomadic countries escape the tax and in estimating wool production, an estimate has been made for untaxed sheep.

Production in the 3 countries, of which Morocco is the most important and Algeria next, is estimated at 55 million pounds in 1947, a reduction of 20 percent as compared with the 1936-40 average. The main cause for the reduction, besides the war, was the severe drought in Morocco in 1944-45. Sheep losses were heavy in 1945 and continued into 1946 because of the almost total absence of vegetation.

Obviously only rough approximations of the trend in sheep numbers and in wool production are available for the important carpet wool producing countries of Asia. Production in the Soviet Union in 1947 is believed to have continued the upward trend noticed since 1944 and is now about on a level with the 1936-40 average but considerably above the 1931-35 average when production was unusually small due to the liquidation of sheep by the rich farmers who preferred to slaughter their sheep rather than enter the collective farms.

Production in China, exclusive of Outer Mongolia, is estimated to have declined to about 75 million pounds compared with a 1936-40 average of 88 million and a 1931-35 average of 90 million pounds.

Production in India was officially estimated at 80 million pounds of shorn and pulled wool in 1940. Since then some increase in sheep numbers and in wool production is indicated.

Production in the 4 Middle East carpet wool producing countries, Iran, Iraq, Syria and Turkey, totaled 112 million pounds in 1947, according to preliminary estimates, a decrease of 16 percent compared with 1946.

The reduction was principally in Turkey, the largest producing country. The heavy slaughter of sheep in the winter of 1945-46 due to shortage of fodder and grazing following the drought is reflected in smaller wool production in 1946 and 1947. Production in these countries is now about 18 percent below the 1936-40 average. Sheep numbers and wool production in Turkey increased during the early years of the war but thereafter decreased partly as a result of higher prices for meat and indiscriminate slaughtering of animals.

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This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C. L. Purves, Floyd E. Davis, Esther M. Johnson, Hazel B. Kefauver, Lois B. Bacon, Kathryn H. Wylie and Mary E. Long.





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## WORLD WOOL PRODUCTION IN 1947 1/

By Esther H. Johnson.

### SUMMARY

World wool production in 1947 is now expected to reach 3,720 million pounds, an increase of one percent above the preliminary estimate published in June 1947 2/. Improved weather and feed conditions in the important wool-producing countries of the Southern Hemisphere indicate upward revisions for some of these countries which offset downward revisions in important Northern Hemisphere countries such as the United States and the United Kingdom.

Southern Hemisphere production in 1947 is now estimated at 2,310 million pounds or 62 percent of the world's total output. This is one percent below the preceding year but 3 percent above the average for the years 1936-40. The bulk of the world's exports of fine apparel wool comes from this area. The wool output is of particular interest at this time of year, as shearing of the new clip has just passed its peak and the clip is being marketed. Prices currently being established are having an important influence on world prices of wools and the prices that the United States will have to pay for imported wool.

Production in the Northern Hemisphere, where all the world's important consuming countries are located, is estimated at 1,410 million pounds, a reduction of 4 percent below 1946. Changes in the Northern Hemisphere since publication in June 1947 are confined principally to a downward revision in the United States, in Canada and in the United Kingdom.

The important wool-producing countries of continental Europe are Spain, Rumania, France, Germany and Italy. Production in these five countries combined is below prewar levels. Spain is the only country with increased production. For Europe as a whole wool production in 1947 totaled 405 million pounds compared with 416 million pounds in 1946 and the 1936-40 average of 514 million pounds.

This is the full report on world wool production for 1947, published in summary form in Foreign Crops and Markets December 1, 1947 and approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics.

1/ This report covers estimates of wool production for the calendar year 1947 for the Northern Hemisphere and preliminary estimates for the Southern Hemisphere for the season 1947-48. Season begins July 1 in Australia, New Zealand and South Africa and October 1 in South America.

2/ Published in FW 1-47, June 23, 1947.

Production in the Soviet Union has increased since the low point reached in 1945 and is now tentatively estimated at 270 million pounds or approximately the same as in 1936-40.

The bulk of the world supply of carpet wool originates in Asia where the two largest producers of strictly carpet type wool are located. Only rough estimates are available for these countries. Such estimates indicate that production in China, which has suffered from a prolonged war, has declined and is now about 17 percent below the 1931-35 average. In India, the long-time trend appears to be upward and despite some decrease in the later war years, production in 1947 is about 14 percent above the prewar average.

Production in the four 3/ Near and Middle Eastern countries in 1947 fell to 122 million pounds, a decrease of 11 percent below 1946 and 10 percent below 1945 according to reports received from foreign service officers. The decline since 1945 has been principally in Turkey.

Wool production in French North Africa, Algeria, Tunisia and Morocco, in 1947 is now estimated at 51 million pounds, a decrease of 8 percent as compared with 1946 and 14 percent below 1945. The principal decrease was in Algeria and Morocco in 1946 and was the result of adverse weather conditions.

#### SOUTHERN HEMISPHERE

##### British Dominions

Weather and feed conditions in Australia improved materially in 1947 and wool production is now expected to be slightly higher than in the previous year. Lambing percentages in that country are reported as excellent and should favorable weather conditions continue into 1948 a slight increase may be expected in sheep numbers on March 31, 1948. With these improvements in producing conditions, and with strong world demand for fine wool, an upturn in production in the next few years is indicated.

Good weather and feed conditions in 1947 and prospects that these conditions will extend into 1948 have indicated a slight upward revision in the Australian estimates for the 1947-48 season to 980 million pounds. This is 5 percent above the low point of 932 million pounds to which production fell in 1945-46.

Under favorable weather for a season or two sheep numbers in Australia could increase rapidly. Average losses in the years 1937-38 to 1941-42 were 7,300,000 annually, the smallest being 6 million head in 1939-40. Losses increased in 1944-45 to 18 million head, fell to 13 million in 1946-47, and were only slightly above normal in 1946-47.

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3/ Iran, Iraq, Syria (including Lebanon) and Turkey.

The number of lambs marked (saved) in 1946-47 was 25,186,000 according to official statistics, an increase of 22 percent above the 21 million saved in 1945-46. Should the lambing percentage be normal or 65 percent in 1947-48 the number of lambs saved would total 26 million. The average number saved in the five seasons 1940-41 to 1944-45 was 31 million head.

The number of sheep on hand on March 1947 is officially estimated at 95,723,000 or only 0.7 percent below the preceding year. This number, however, is the lowest since January 1, 1925 and approximately 29 million head below 1942 when numbers were the highest on record. The decrease in 1946-47, as compared with the preceding year, was due to a reduction of 2,839,422 in Queensland and 971,000 in New South Wales. Drought conditions existed in the northern part of New South Wales, and throughout Queensland during most of 1946. Increases in Victoria, South Australia and Tasmania were almost sufficient to offset these losses, however.

The average yield of wool per sheep and lamb shorn in New South Wales, where 45 percent of the Australian clip originates, was 8.9 pounds in 1946-47 compared with 8.5 pounds in 1945-46. The average for the five preceding seasons was 8.2 pounds. The average yield for all Australia in 1944-45, the latest date for which official figures are available, was 7.61 pounds compared with a preceding 5-year average of 8.1 pounds.

Australia still has a considerable carryover of wool for disposal. The quantity reported as held by the Joint Organization in Australia on June 30, 1947 was reduced to 880 million pounds compared with 930 million pounds on the same date of 1946. Total carryover stocks as of June 30, 1947, including stocks held by private interests, are estimated at 1,150 million pounds against 1,680 million pounds a year earlier, or a reduction of 530 million pounds.

Exports from Australia in 1946-47 reached the record total of 1,212 million pounds, actual weight, compared with 807 million pounds in 1945-46 and average prewar exports (1934-35 to 1938-39) of 827 million pounds. In 1946-47 exports to the United States represented 28 percent of total exports to all countries.

Sheep numbers in 1947 in the Union of South Africa probably reached the lowest point for several years because of extended periods of drought. Conditions have improved, however, and an upturn in woolled sheep may be expected. This country, together with Australia and the United States, produced the bulk of the world's fine apparel wool, and production in the three countries combined in 1947 was about 15 percent below the average for 1936-40.

Wool production for the 1947-48 season (July-June) is now estimated at approximately 200 million pounds or 4 percent below 1946-47.

Although the 1946 census figures will not be published until 1948, it is unofficially estimated that the number of woolled sheep fell to a new low of 29,500,000 in 1946. This compares with the official census of 30,211,108 head in 1943. The steady decline in sheep numbers in recent years is the result of periods of extended drought during which large numbers of sheep died for lack of pasture and water or were sold for slaughter.

The Union normally has a considerable surplus of fine wool for export and wartime accumulations have added to the normal exportable supply. There was an important reduction in stocks in 1946-47 of about 210 million pounds and exports for the season reached the record total of almost 380 million pounds, actual weight, compared with 284 million pounds in 1945-46 and an average prewar export of 231 million pounds. The distribution of exports was considerably different from the prewar years; with 63 million pounds going to the United States, compared with an average of 2 million pounds in the prewar years 1934-35 to 1938-39. Exports to continental Europe were large with Italy the chief destination, instead of Germany as in prewar years. Exports to France and Belgium were also larger.

Stocks on hand on June 30, 1947 are estimated at 100 million pounds, 70 percent held by the Joint Organization and the remainder in the hands of private holders, probably most of it sold and awaiting shipment.

Wool production in New Zealand for the season 1947-48 is now estimated at approximately 360 million pounds, or approximately the same as for 1946-47. While smaller by 3 percent than the record production of 1944-45, the current output will exceed the average for the 5 years 1936-40 by about 15 percent. Favorable producing conditions existed in the winter and early spring months of 1947 (June-October).

There has been no official estimate of sheep numbers since April 1945 when 33,975,000 sheep and lambs were reported on hand. Unusually heavy slaughter in 1945-46, especially of ewes, was expected to bring about a decrease as of April 30, 1946, despite a very slight increase in the number of lambs saved. In 1946-47 lambing was smaller than in the preceding season but slaughterings also fell off so that sheep numbers as of April 30, 1947 were probably not greatly different from those in 1946.

In addition to current production of 360 million pounds, New Zealand still has wool on hand from the wartime accumulation. The quantity of New Zealand wool held by the Joint Organization in New Zealand was reduced to 280 million pounds as of June 30, 1947. The estimated quantity in private hands on June 30, 1947, some of which may have been sold but not exported, was about 110 million pounds, making a carryover of 390 million against 450 million a year earlier.

Exports for the season ended June 30, 1947 reached approximately 370 million pounds, actual weight basis, an increase of 25 percent above the preceding season and 35 percent above the prewar average.

#### South America

Argentine wool production in 1947 is now estimated at 495 million pounds according to the estimate of the Buenos Aires Branch of the First National Bank of Boston. Reports indicate that sheep numbers probably reached the peak in June 1945 when they were the largest for many years. Numbers have received a check since then, especially in 1947 and the current estimate of wool production is 4 percent below 1946. The reported decline in sheep numbers is due to smaller lamb crops in the past two seasons. The 1947 lamb crop will probably show an overall decrease of from 10 to 15 percent.

Agricultural experts in Argentina report some apparent shifting from sheep to cattle raising, especially in the Province of Buenos Aires, where coarse crossbred wools predominate. Some of the reasons given for the shift and the reduction in numbers are labor difficulties and the greater relative profit from cattle grazing. Shearing costs are reported to have increased over 200 percent and prices of low-crossbred wool are considerably below the prewar level. The keen European demand at present is for the finer wools.

A little over two-thirds of the wool produced in Argentina is fine and medium wool with the remainder consisting of coarse crossbred and "criolla" wool (Cordova carpet wool). Much of the coarse crossbred is lower than 40's in quality and is imported and used for carpet purposes in the United States, which is the chief market for that type of Argentine wool.

Weather conditions in Buenos Aires Province were fairly good in the early part of the winter (June) but conditions were very dry in late July and August 1947, and the quality of the coarse crossbred clip has been adversely affected. It will carry more burr than usual. Conditions were also unfavorable further north in the Province of Santiago del Estero where most of the "criolla" or Cordova carpet wool is produced.

Conditions for wool growing were also not particularly favorable in the northeastern Provinces of Corrientes and in La Pampa territory, Entre Rios, where fine crossbred wool predominates and in the northern part of Patagonia, where fine merino wool is produced.

In the fine crossbred region of southern Patagonia, (Santa Cruz Province) conditions were about normal and also in Argentine Tierra del Fuego where most of the medium crossbred wool is grown.

The exportable surplus for the season beginning October 1, 1947 remains large and is estimated at approximately 715 million pounds, grease basis, a very slight reduction as compared with a year earlier. Although carryover stocks in Argentina have been reduced by 250 million pounds since October 1, 1945, they are still substantial, being estimated at 330 million pounds as of October 1, 1947, or 3 percent larger than a year earlier. Normal prewar stocks averaged only about 40 million pounds annually. Consumption in 1947-48 is expected to be about 110 million pounds or the same as in the preceding season.

Exports from Argentina were smaller in 1946-47, falling to about 346 million pounds actual weight, a reduction of 33 percent below the record shipments of 1945-46. Prewar shipments in the season 1934-35 to 1938-39 averaged 305 million pounds annually. Exports to the United States totaled 173 million pounds last season against 1945-46 exports of 356 million pounds and a prewar average of only 53 million pounds.

Uruguayan wool production in 1947-48 is now expected to show a decrease to 168 million pounds, a reduction of 4 percent below the record production of 1946-47. Production still exceeds the prewar average of 1936-40 by 33 percent, however.

Uruguay is a fine and medium crossbred wool-producing country with about one-half the clip being finer than 56's and most of the remainder finer than 44's. Only a small proportion, about 3.5 percent, is coarser than 40's.

While there has been no official estimate of sheep numbers since December 31, 1943 when they were reported at 20,289,000, estimates supplied by foreign service officers indicate an increase since that date to 24 or 25 million head at the present time. The general long-time trend in sheep numbers and in wool production was apparently upward from 1936 to 1940, with a setback in 1941 due to widespread drought. Sheep numbers recovered rapidly and the upward trend was resumed.

The number of sheep shorn in the last half of 1947 was probably somewhat below the record total of the preceding season. The average yield per sheep may also have been less due to drought in some sections of the country.

Rainfall was below average in the months July-October 1947, especially in the southern part of the country. In the northern part rainfall was heavier than usual. Sheep are widely distributed in Uruguay. At the last official census in 1943, when numbers were estimated at 20,289,000, approximately 7,535,000 or 37 percent of the total were north of the Negro River, and 12,754,000 or 63 percent south of that river. The most important sheep area, however, is in the southeastern part of the country.

Exports of wool for the 1946-47 season, which closed September 30, amounted to 137 million pounds, actual weight, a decrease of 6 percent below the preceding season and 33 percent below record reports of 1944-45. Exports were 19 percent above the average for the five seasons 1934-35 to 1938-39.

Shipments to the United States in 1946-47 were 24 percent below 1945-46 but over four times as large as the prewar average. Prior to the war exports to continental Europe represented 62 percent of total exports and in 1946-47 exports to that destination again were approaching normal with about 47 percent of the total going to that destination, especially to the Netherlands, Belgium, France, Sweden and Italy.

Other important wool-producing countries of South America are Brazil, Chile, and Peru.

Brazil produces the largest quantity of these three countries with production estimated at 39 million pounds in 1947. This exceeds the prewar average by 10 percent.

The principal area of production is the state of Rio Grande do Sul which supplies around 80 percent of the total. The difficulties of the past winter and spring in that state are reported to have caused exceptionally heavy losses of lambs. This is not expected to affect the current 1947-48 clip which is already being shorn.

Brazil in the prewar years 1934-38 exported on the average 10 million pounds annually with continental Europe the chief destination, Germany alone taking 80 percent of the total. Uruguay was the chief non-European destination. During the early war years exports were chiefly to the United States but in

1943 and 1944 they fell off entirely and imports rose as domestic demand increased. In 1946 the export pattern became more normal with 2 million pounds going to continental Europe, chiefly Finland and Sweden. Exports to the United States fell from the wartime high of 6 million pounds in 1941 to 2 million pounds.

About 63 percent of the Brazilian wool clip is fine and medium crossbred, 15 percent merino and 22 percent coarse crossbred and "criolla" or native wool.

Wool production in Chile is estimated at 32 million pounds in 1947 or approximately the same as the prewar average but 11 percent below 1942. Indications are that sheep numbers and wool production have declined somewhat from the level reached in the early war years. Lambing percentages were below normal and heavy losses of lambs were reported from Magallanes in late 1946 as the result of adverse weather conditions. Almost 60 percent of the Chilean wool clip originates in this area and practically the total exportable surplus. Difficulties in making arrangements for the disposal of the wool clips during the war and increased demand for meat may also have accounted for some decrease in wool production. Domestic consumption is also reported to be increasing. Imports rose to 5 million pounds in 1943-44 but fell off to 4 million in 1945-1946. This is about four times the prewar average. Imports were mainly from Argentina.

Chile produces mainly fine crossbred wool and normally exports about 70 percent of the total output. The United Kingdom is the traditional destination, with Germany coming next in importance. The prewar exports averaged 23 million pounds annually. During the war, most of the wool was shipped to the United States for marketing in accordance with an agreement between the United Kingdom and United States Governments. Less than 200,000 pounds of Chilean wool were exported annually to the United States in the years 1934-38. During the years 1941-45, out of an annual average of 21 million pounds, 76 percent went to the United States. The United States was still the chief destination for the smaller exports of 17 million pounds in 1946, although shipments to continental European countries increased. A further decrease in exports of Chilean wool is indicated for 1947 with shipments for the first 8 months being 12 percent below a year earlier.

Peru produced around 20 million pounds of sheep's wool, which is not greatly different from the average for the years 1936-40. Consumption has increased somewhat and now absorbs around 60 percent of production on a grease basis.

Exports amounted to 4 million pounds actual weight in 1945, which was about one million pounds below the 1936-40 average. The chief destination was the United States, which took practically the total quantity. Prior to the war, the chief destinations of Peruvian wool exports were Germany and the United Kingdom. Exports to the United States for the years 1934-38 averaged only 5,000 pounds annually.

Relatively small quantities of wool are produced in the other South American countries, namely Colombia, Ecuador, Bolivia and the Falkland Islands, but none of them produces as much as 10 million pounds annually. The wool is chiefly consumed within the country. Most of them are on an import basis for raw wool and finished products.

The Falkland Islands is the only exception with exports averaging about 4 million pounds annually or practically the total production. This is normally shipped to the United Kingdom to be disposed of at the auction sales of colonial wools.

## NORTHERN HEMISPHERE

### North America

The downward revision in the estimate for the United States is due mainly to a smaller production of pulled wool, now forecast at only 52 million pounds or the smallest quantity in many years. Production of shorn and pulled wool in 1947 is estimated at 308 million pounds compared with 341 million pounds in 1946 and an average for 1936-40 of 425 million pounds. A further small decline is indicated for 1948 as a result of an expected smaller number of stock sheep on hand on January 1, 1948. The 1947 lamb crop was the smallest in 22 years and next year's crop promises to be even smaller because of a further reduction this year of the number of ewes of breeding age.

A recent census of sheep numbers made in the Canadian Prairie Provinces has caused the Canadian Government to revise its estimate for June 1946 downward from 3,378,000 to 2,942,000. This necessitates a downward revision of the wool estimate for that year to 17.0 million pounds. A further decrease in numbers of sheep in 1947 of 8 percent brings production for 1947 to the low point of 14 million pounds which is 18 percent below 1946 and 10 percent below the average for the years 1936-40. Shorn wool alone was 10 million pounds in 1947 compared with the revised estimate of 11 million for 1946 and 15 million in 1945.

### Europe

Sheep numbers and wool production in the United Kingdom were materially smaller in 1947 as the result of adverse weather conditions during the winter and spring months. The number of sheep as of June 1947 fell to 16,873,000, the lowest numbers in many years and 17 percent below 1945. Wool production showed a corresponding decrease and is now estimated at 70 million pounds, against 87.5 million in 1946 and an average of 110 million for the 5 years 1936-40. Several years will be necessary to rehabilitate the sheep industry. Various subsidies have been proposed to encourage breeding. The government has again purchased the wool clip at an average increase of 6d. per pound on the annual basic price and the domestic wool is being sold at public auctions which began in November.

The countries of western Europe produce mainly fine and medium apparel wool, whereas southeastern European countries produce a coarser quality. Continental Europe as a whole produced a little under 30 percent of total consumption requirements in the years 1934-38, imports for consumption totaling over one billion pounds annually. With production 17 percent below the 1934-38 average and machinery activity at a high level, large imports are necessary at present. Rehabilitation of the sheep industry in European countries has already begun but with the current need for food it may be several years before numbers reach the prewar level. Wool imports will probably exceed the prewar average for some years.

The wool deficit is largest in France, Belgium, Italy, Germany, Czechoslovakia, Poland and Spain. The countries of southeastern Europe are more nearly self sufficient.

Spain is by far the most important fine and medium wool-producing country of western Europe with production in 1947 estimated at 78 million pounds or 24 percent of the continental European total. Some unofficial sources place current production as low as 70 million pounds. There has been a decrease since 1944 when production reached 88 million pounds but the output is still about 10 percent above the 1936-40 average; mainly because of some increase in the average weight of fleece.

Estimates of current sheep numbers vary from 19 million to 19.5 million as compared with the most recent official estimate of 23,489,000 sheep of all ages reported for 1942. The decrease is attributed to the serious drought of 1945 from which the sheep population has not recovered. The recommended official program for the industry, however, is fewer sheep and heavier fleece yield. 4/ A little over 80 percent of Spanish wool is fine and medium cross-bred with the remainder coarser wool used in mattresses and carpets. Spain is almost self sufficient as far as raw wool is concerned with net imports very small.

Germany probably comes next in continental Europe as a producer of fine and medium wool, although current production is believed to be about 25 percent below the prewar average, with even a larger decrease from the record production of 1944. The long-time trend in sheep numbers and in wool production was upward before and during the war as a result of various government aids encouraging larger production.

Credits were made available to sheep raisers for the purchase of stock as early as 1935 and prices for home-grown wool were fixed well above the world level. A rebate was given by the government to the purchasers of domestic wool. Facilities were also granted sheep owners for transport on railways and a National Pasturage law was included in the Four Year Plan to regulate the utilization of common pastures.

Even at its largest, domestic production was considerably under consumption requirements. In the years 1934-38 only 12 percent of requirements was produced and during the war when normal sources of supply in the Southern Hemisphere were inaccessible, Germany was very short of wool and had to resort to substitutes on a large scale.

France now comes after Germany as a wool-producing country. The trend in sheep numbers and in wool production has been downward, whereas in Germany the trend has been upward. The average yield of wool per sheep in France is also below that of Germany.

While wool production in France may increase somewhat, it is not expected that it will ever again reach the 1909-13 average of 75 million pounds, much less that of the 1880's and 1890's when, according to official figures, production was over 100 million pounds.

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4/ For further details see FW 1-47, page 10.

France has always been the most important wool-consuming country of continental Europe. In the prewar years this country produced only around 10 percent of total consumption requirements and at present the percentage is considerably lower. Imports for consumption in 1946 were large, totaling 574 million pounds including wool imported on sheep skins, or 35 percent above the prewar average (1934-38). Imports continued large in the first half of 1947, amounting to 222 million pounds, but were 14 percent smaller than in the same period of 1946. The large imports in the first half of last year represented purchases made in the Southern Hemisphere while wartime controlled prices were still in effect. Prices since then have advanced materially.

Wool production in Italy totaled approximately 27 million pounds in 1947 which is above the low point to which it fell in 1945 but still 10 percent below the 1936-40 average.

Sheep numbers suffered a noticeable decrease during the war, resulting in a decrease in wool production. Farmers have taken little trouble to improve production in recent years, and although breeding has been increased in the last two years the number of sheep still remains low. Around 40 percent of Italy's production is fine wool for combing and carding, 33 percent coarse and ordinary wool for cloth of average value and 27 percent is used for mattress wool.

Italy is now the second most important wool-consuming center of continental Europe. In the prewar years domestic production took care of about 25 percent of requirements but the proportion at present is less.

Imports of greasy, scoured or dyed wool totaled 162 million pounds for the entire year 1946, an increase of 70 percent above the 1934-38 average. Approximately 25 million pounds of the 1946 imports, however, consisted of wool combed or otherwise processed for foreign countries and to be re-exported. Thus the actual quantity to be used in the Italian industry for producing materials for home consumption and for export was 137 million pounds or 44 percent above the prewar average. Including raw wool, carded and combed wool and wool waste, the total for 1946 was 167 million pounds. Imports on a comparable basis for the first 5 months of 1947 exceeded that for the whole year 1946 and amounted to 192 million pounds, 14 percent of which was for processing for foreign countries (classed as temporary imports).

Belgium produces less than one million pounds of wool annually but is an important consumer and thus requires large imports. The quantity imported in 1946 for consumption (imports less re-exports) totaled 243 million pounds, each of which was imported for processing for foreign countries. Prewar consumption averaged a little over 120 million pounds annually. Imports less re-exports in the first half of 1947 totaled 126 million pounds.

Poland and Czechoslovakia, while relatively small producers of wool, have important wool industries which require a considerable quantity of imported wool. These two countries combined now produce less wool than in prewar years when domestic production represented a little over 10 percent of consumption.

The six 5/ countries of southeastern Europe now produce roughly 106 million pounds, within prewar boundaries, or 5 percent above 1946 but 30 percent less than in prewar years. Practically all of these countries, except Rumania, showed a slight increase in production above 1946 but the quality was poorer due to scarcity of feed. Rumania is the most important producing country of this group and the second largest wool-producing country of continental Europe. Yugoslavia comes next to Rumania, then Bulgaria, Greece, Hungary and Albania in the order named.

The wool produced in these countries, with the exception of Hungary, is of a coarse low quality, chiefly suitable for the production of handmade cloth materials for farmers, shepherds and woodsmen. Other home industry uses include coarse blankets, spreads, carpets, sacks and wraps.

Rumania produced considerably less wool in 1947 than in the years 1936-40 when production reached 50 million pounds annually. South Dobrudja, which was a part of prewar Rumania, is now part of Bulgaria but this accounts for a relatively small part of the decrease as compared with prewar. The immediate cause of a smaller clip in 1947 was the 1946 drought which adversely affected production in the spring of 1947.

Approximately 85 to 90 percent of Rumanian sheep are run on a farm-flock basis. The government program provides forage for subsistent livestock, work and breeding animals, but the major drought relief program is naturally concentrated on providing food. Large numbers of sheep and other livestock were slaughtered during the summer of 1946 because of lack of feed and water in the eastern third of Rumania.

Sixty percent of Rumanian wool production is from the Turcana breed. These sheep have long thick fleeces and develop perfectly in mountain areas. They have a long outer fiber and an under fiber which is short. The wool is principally used in household industry for blankets and carpets. The next most important breed is the Tigae which furnishes about 30 percent of the production and is chiefly used in the textile mills. It is a medium wool of very good quality and much in demand by the mills because of its fineness and elasticity. The remainder of the sheep in Rumania are principally crosses between these two breeds or crosses with the merino.

Rumania has a larger wool consumption than any other country of southeastern Europe and in the years 1934-38 supplied 99.5 percent from domestic production. At present probably not more than 70 percent of requirements is produced, although not much information is coming from this area at present.

Because of its coarse quality, not much more than one-third of the domestic clip is ordinarily used in the mechanized industry, the bulk being consumed in village handicrafts.

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5/ Rumania, Yugoslavia, Bulgaria, Hungary, Greece and Albania.

Yugoslavia has plans for expanding the sheep and wool industry. Sheep are to be increased several million head above the present numbers and a material improvement in the average yield per fleece is expected. Production of wool in 1947 was apparently considerably below the prewar level. Domestic production is not sufficient for consumption requirements and imports are necessary.

Compulsory wool collections are still in effect and the regulations for 1947 are more severe than for 1946. Lists of the number of sheep and lambs owned by individual farmers are kept and peasants with 5 sheep and up are required to deliver a stated amount of wool per sheep and lamb. After the required deliveries have been made they may dispose of the remainder as they wish but special efforts are being made to have it marketed through cooperatives and other government-directed channels. Difficulties are encountered in effecting deliveries as the black market price is much higher than the price fixed by the government.

Yugoslavia was the second most important wool-consuming country of southeastern Europe before the war and domestic wool furnished 84 percent of total requirements. Imports of raw wool were larger than in Bulgaria or Rumania and averaged 8 million pounds annually with exports averaging one million pounds. With the present reduced domestic production, import requirements have necessarily increased.

Wool production in Bulgaria, including Southern Dobrudja, is estimated at 26 million pounds in 1947 or 18 percent above corresponding estimates for 1946. Only rough estimates are available and exact comparison with prewar years is not possible, but Bulgarian production appears to be nearer the prewar level than that of Rumania.

Bulgaria was almost self sufficient in wool production in prewar years and with production about at the prewar level, will have relatively small import requirements.

Sheep numbers in Greece are being steadily increased. At the present rate it seems likely that numbers may again reach the prewar level in a few years.

Wool production naturally follows the trend in sheep numbers and a substantial increase has occurred since 1944 when the lowest wartime level was reached. Production, however, at 15 million pounds is approximately 22 percent below the prewar average. The quality of the wool is such as to limit utilization largely to home spinning and weaving. Greece was the fourth most important consumer of raw wool in southeastern Europe in prewar years and supplied from domestic production a little over 75 percent of total requirements. With reduced production, import requirements will be larger. In 1946 only 2 million pounds were imported compared with an average prewar importation of 7 million pounds annually.

Wool production in Albania now slightly exceeds the 1936-40 level.

Hungary now produces an insignificant quantity of wool. Production in 1947 is estimated at only 4 million pounds or about one-third of prewar. Hungary has a present machinery capacity for using 22 million pounds of raw

wool annually. Efforts are being made to increase sheep numbers and wool production, which suffered a serious setback during the war, but the lack of breeding animals and inadequate pasture facilities are now delaying recovery.

Hungary was about self sufficient in raw wool before the war but large imports will now be necessary for some years to come. Only 2 million pounds were imported in 1946, chiefly from the Soviet Union. In early 1947 (3 months) one million pounds were imported; the chief source was Australian wool from the United Kingdom.

The situation in French North Africa is somewhat similar to that in the Near and Middle East with a large part of the sheep owners belonging to nomadic tribes. In addition drought or bad winter storms may cause heavy deaths. Hand feeding by natives is practically unknown. In some years well-distributed rainfall results in plenty of natural pasturage, and sheep flourish. In other years rainfall is insufficient or received at the wrong time and the scarcity of vegetation decimates flocks.

Morocco is the largest wool-producing country of French North Africa. Production from taxed and untaxed sheep is estimated at 25 million pounds in 1947, a decrease of 17 percent below 1946. Production is now 38 percent below 1943. Sheep numbers increased rapidly from 1940 to 1943 but an almost total absence of vegetation in 1945, which continued into 1946, resulted in heavy losses of sheep in 1945 from which they have not yet recovered.

Morocco exported 14 million pounds of wool in 1938 with over 70 percent of the total going to France. None went to the United States.

Wool production in Algeria from taxed and untaxed sheep is estimated at 20 million pounds in 1947 which is 2 percent above 1946 but 14 percent below 1942.

The official estimates issued by the Algerian Government cover only the quantity officially recognized as commercial and not the total quantity produced. Thus they did not include the black market transactions during the war nor, of course, the amounts kept by producers.

The only estimates of sheep numbers issued by official sources cover the number of sheep taxed. Thus an estimate of total sheep numbers is made difficult because no accurate check can be made of the owners evading the tax or of mortality, which last depends on the very variable weather factor in Algeria. In the winter of 1944-45, in one night, a snowstorm killed about 1,500,000 sheep in the Department of Constantine.

The long-time trend in sheep raising appears to be downward on the western high plains of Algeria where sheep raising reached a maximum in 1908. Since 1919 they have tended to decline before the exaggerated extension of grain production and increasing competition from the flocks of the nomadic inhabitants of the Sahara, according to an article on the Geographical Regions of Algeria by Professor Jean Despois published in L'Encyclopedie Coloniale et Maritime of 1946, translated by a member of the American Embassy at Algiers. The article states further that the recent construction of "Gourbis" of earth and houses rather than the traditional tent on the Hodna Plains and in Eastern Tell by former nomadic sheep raisers is a sign of settling down and often too of the beginning of impoverishment. Many have been ruined by trying to raise grain without proper irrigation.

The principal destination of exports of wool from Algeria is France. These exports totaled 741,000 pounds in 1946. Exports were very small in 1944 and 1945 and none were reported in 1943. Before the war in 1938, exports amounted to 14 million pounds of grease and scoured wool. In addition some wool was exported on skins. Very little wool comes to the United States from Algeria.

Tunisia produced about 11 million pounds of wool in 1947 or slightly less than in 1946. A further decrease is indicated for 1948.

Sheep numbers were increasing before the Axis occupation and reached 3,667,000 in 1942. In 1944 the number was estimated at 3,327,000. Since that year near-drought conditions, particularly acute in the sheep-raising regions of central Tunisia, have caused a steady decline to an estimated 2,783,000 at the end of 1946. It is expected that by the end of 1947 they will have fallen still further to 2 million head.

Tunisia exported 9 million pounds of wool in 1938 and 66 percent went to France.

#### PRINCIPAL CARPET WOOL PRODUCING COUNTRIES

Many of the sheep owners in the Near and Middle East belong to nomadic tribes. These owners may easily drive their sheep across boundaries for the purpose of escaping the tax or for shearing, depending on marketing conditions in the several countries. For these reasons accurate estimates of sheep numbers and of wool production are not available and only rough estimates are possible.

This area includes the important carpet wool surplus-producing countries of Asia Minor, namely, Turkey, Iran, Iraq and Syria.

Latest estimates indicate an upward revision in the 1947 estimate for Turkey to 55 million pounds, which is still 20 percent below the revised estimate for 1946.

The trend in sheep numbers and in wool production has been downward since 1945 and is now 19 percent under the prewar average. The main reason given for the decline in sheep numbers since 1945 is the large-scale slaughtering of sheep because of high prices for mutton.

Exports of wool from Turkey were prohibited during the war. They totaled one million pounds in 1946, about half to the United States and half to Bulgaria. This compares with an average export for the years 1934-38 of 17 million pounds annually with Germany and the Soviet Union the main destinations. In the first half of 1947 approximately one million pounds were exported with the bulk going to the United States. Turkey has greatly increased imports, principally of fine wool, which amounted to 9 million pounds in 1946.

Wool production in Iran in 1947 is estimated at 30 million pounds or approximately the same as in 1946 but 17 percent below the average for the years 1936-40. The quantity of shorn wool produced was 20 million pounds or slightly smaller than in 1946. The quantity of wool pulled from slaughtered sheep was larger than for any recent year, reaching approximately 10 million pounds.

Contrary to earlier reports it is now stated that the quality of the clip is not as good as last year's. Fleeces were lighter as a result of less favorable weather but a larger number of sheep were shorn.

Owing to heavy slaughter and high death losses it is expected that sheep numbers as of March 21, 1948 will be slightly lower than the 13,190,000 reported in March 1947. This, together with the present unfavorable range conditions, may cause a decrease in wool production in 1948.

Stocks of wool at the beginning of the current season April 1 were approximately 18 million pounds, as compared with 22 million at the same date of 1946. Stocks have been reduced as compared with the record of 31 million in 1942 but are still considerably above the prewar average of 9 million pounds. Stocks as of October 1 were estimated at about 26 million pounds mostly in the hands of dealers. Mills were reported as buying only for current requirements.

Domestic consumption in the 1947-48 season was expected to be about 19 million pounds, a decrease of 3 percent below 1946-47 and about on the level with average prewar consumption.

Exports during the 1946-47 season increased to 13 million pounds and were about twice as large as the average for the two preceding seasons. Included is an estimate for wool exported, without clearing customs, stated to be large during recent years according to informed sources.

Imports of wool into Iran are relatively small and are principally fine wools from Australia for blending purposes.

Iraq's wool production in 1947 is estimated to have reached at least 24 million pounds and may have been somewhat larger. Production is now about 12 percent above the average for the years 1936-40.

Livestock was reported in generally good condition at shearing time. The majority of sheep are kept by nomadic or semi-nomadic tribes concentrated in the mountainous area in the summer and moving to the desert pastures in winter. Unofficial estimates place present sheep numbers in the neighborhood of 8 million. This compared with only 6 million at the beginning of 1944 when they reached a low level.

Iraq is an important exporter of carpet wool. Exports to the United States in 1946 amounted to 10 million pounds but were very much smaller in 1947. Trading was almost at a standstill owing to the reluctance of producers to lower prices to the level prevailing in foreign markets.

Syria and Lebanon are estimated to have produced about 13 million pounds of wool, grease basis, in 1947, which is 9 percent below 1946 but 30 percent above the 1936-40 average.

Sheep mortality in 1947 is estimated as high as 30 percent by trade sources and the surviving number in Syria at 2,500,000.

A spring drought resulted in poor pastures and consequent sheep losses. Continuing heavy slaughter of flocks because of shortage of pasture is expected to affect materially 1948 wool production.

In order to encourage sheep breeding, the Syrian Government is considering three important measures: (1) The establishment of wells at important central points to insure flocks against losses caused by droughts similar to this year's; (2) government aid to farmers to encourage increased sheep breeding; (3) abolition of the head tax. Considering Syria's present financial situation such measures are not likely to be put into effect immediately.

Syria normally has an exportable surplus of carpet wool. In 1946 exports amounted to 6,302,000 pounds, with approximately half going to the United States. This includes the carryover from 1945 when there were no recorded exports. Present indications are that most of the 1947 clip and the 1946 carryover estimate of 2 million pounds will reach the world market before the 1948 clip comes on the market next spring.

#### Far East

Wool production in India in 1947 is roughly estimated at approximately 83 million pounds based on a reported 50 million sheep as of January 1, 1947. Latest reports state that the autumn or yellow clip for 1947 will be 10 to 15 percent below the prewar production or about 41 million pounds. The white spring clip and the yellow fall clip constitute the bulk of Indian production. In addition around 10 million pounds of greys are produced. Stocks of the white or spring clip are said to be exhausted.

Owing to unsettled conditions, the yellow clip, which is normally shorn in August and September, is not expected to reach the market until later, possibly not until 1948. Prices of good wool had risen 45 percent, and while American buyers were offering 57-60 cents and 52-55 cents a pound clean basis for best white and yellow wools, Indian holders were asking one to two cents more.

China is one of the world's largest surplus producers of carpet wool. Estimates of production are only approximate but according to last available information, production in China and dependencies, excluding Outer Mongolia, totaled 75 million pounds in 1947, a decrease of 12 percent compared with the average for 1936-40 and 17 percent below 1931-35. Possibly another 30 million pounds is produced in Outer Mongolia.

China has been in a continuous state of upheaval since 1936. Before that year wool exports averaged 52 million pounds in 1931-35 annually; 29 million overseas, 27 million pounds of which went to the United States. Twenty-three million pounds went to the Soviet Union over land boundaries from Outer Mongolia and Sinkiang.

The present movement to the Soviet Union is unknown. United States trade statistics show that approximately 6 million pounds of Chinese wool were imported in 1946-47 compared with 7 million pounds in 1945-46.

Exports by sea have been hampered by the civil war as well as by labor, transportation and exchange difficulties. Foreign trade prospects are expected to remain unfavorable so long as business is subjected to present controls whereby imports are subsidized instead of exports. Chinese business circles are said to favor the "link system" even if government would retain 20 percent of export exchange for its own use.

Only a rough approximation of the trend in sheep numbers and of wool production since the war is possible in the Soviet Union. Production of wool in 1947 is estimated to have reached 270 million pounds or about the average for the years 1936-40.

Prior to the war considerable progress had been made in improving the sheep, and coarse wool, which had formerly represented almost the total clip, was reduced to about 72 percent of the total - the remainder being fine and medium wool. At the same time the average weight of fleece was increased.

The war and the German occupation caused great damage to sheep breeding, having diminished the number of fine and semi-coarse wool in the occupied areas. The restoration and increase of fine woolled sheep is one of the important post-war projects and progress along this line has already been made.

Soviet Union has always imported wool with prewar imports averaging about 62 million pounds annually, principally over land boundaries from China, Iran and Afghanistan. During the war imports of fine wool increased from Allied sources. Since the war Soviet Union has competed at the wool sales in the United Kingdom and also purchased about 20 million pounds in South America in 1946-47.

WOOL: Production in specified countries, greasy basis,  
averages 1931-35 and 1936-40, annual 1945 to 1947 1/

Continent and Country	Average		1945	1946 <u>2/</u>	1947 <u>2/</u>
	1931-35	1936-40			
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
<u>North America</u>					
Canada	17.3:	15.6:	19.6:	17.1:	14.0
United States -					
Shorn	366.3:	360.6:	307.9:	279.9:	256.3
Pulled	64.8:	64.7:	70.5:	61.3:	52.0
Total	431.1:	425.3:	378.4:	341.2:	308.3
Estimated total <u>3/</u>	458.2:	451.7:	409.2:	369.5:	333.5
<u>Europe</u>					
Albania	4.2:	4.4:	4.4:	4.8:	4.2
Bulgaria	26.8:	28.7: <u>4/</u>	19.3: <u>4/</u>	21.9: <u>4/</u>	25.7
Eire	18.4:	17.2:	16.1:	14.5:	13.0
Estonia	1.9:	2.4:	- :	- :	-
Finland	2.3:	2.3:	2.2:	2.6:	2.4
France <u>5/</u>	36.9:	37.1:	25.0:	26.5:	23.6
Germany	30.5:	39.8:	- :	- :	-
Greece	17.7:	19.3:	11.2:	13.1:	15.1
Hungary	11.4:	12.9:	2.3:	3.3:	4.0
Italy	31.0:	30.4:	23.8:	24.7:	27.0
Latvia	4.2:	5.9:	- :	- :	-
Lithuania	3.7:	3.6:	- :	- :	-
Netherlands	2.9:	3.1:	2.4:	2.7:	2.8
Norway	5.8:	5.9:	6.1:	5.8:	6.0
Poland	9.9:	11.8:	- :	- :	-
Portugal	15.8:	16.3:	15.8:	17.6:	18.0
Rumania	53.9:	50.3:	- :	- :	-
Spain	68.9:	70.0:	61.5:	79.0:	77.0
United Kingdom	113.8:	110.1:	83.7:	87.5:	70.0
Yugoslavia	30.7:	34.7:	- :	- :	-
Estimated total <u>6/</u>	499.0:	514.0:	406.9:	415.6:	405.1
Soviet Union	159.6:	272.0:	250.0:	260.0:	270.0
<u>Asia</u>					
Iran	38.0:	36.3:	28.7:	29.5:	30.0
Iraq	18.5:	21.6:	23.0:	24.2:	24.2
Syria and Lebanon	11.1:	10.7:	13.6:	14.3:	15.0
Turkey	41.4:	67.7:	70.0:	69.0:	55.0
Afghanistan	15.0:	15.0:	15.0:	15.0:	15.0
China <u>7/</u>	90.0:	88.0:	75.0:	75.0:	75.0
India	71.9:	72.9:	75.0:	80.0:	83.0
Estimated total <u>8/</u>	318.1:	344.2:	332.5:	339.3:	327.5
<u>South America</u>					
Argentina <u>9/</u>	361.0:	411.0:	305.0:	515.0:	495.0
Brazil <u>10/</u>	35.0:	35.5:	39.0:	39.0:	39.0
Chile	33.8:	32.6:	34.8:	33.0:	32.0
Peru <u>11/</u>	18.4:	19.4:	20.1:	20.1:	20.1
Uruguay <u>12/</u>	110.6:	126.2:	175.2:	176.0:	168.0
Estimated total <u>13/</u>	574.8:	638.9:	791.2:	800.6:	771.6

(Continued from preceding page)

WOOL: Production in specified countries, greasy basis,  
averages 1931-35 and 1936-40, annual 1945 to 1947 1/

Continent and Country	Average		1945	1946 <sup>2/</sup>	1947 <sup>2/</sup>
	1931-35	1936-40			
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
<u>Africa</u>					
Algeria	19.1:	22.6:	21.6:	19.8:	20.2
Egypt	5.8:	7.5:	5.6:	5.6:	5.6
French Morocco	30.7:	35.1:	40.0:	30.0:	25.0
Tunisia	11.9:	12.0:	13.2:	11.8:	11.0
Union of South Africa <sup>14/</sup>	269.5:	252.3:	210.0:	209.3:	200.0
Estimated total <sup>15/</sup>	343.1:	336.8:	297.5:	283.7:	269.0
<u>Oceania</u>					
Australia	1,010.5:	1,051.9:	932.9:	970.0:	980.0
New Zealand	281.1:	313.8:	365.0:	360.0:	360.0
Estimated total	1,291.8:	1,365.9:	1,298.0:	1,330.1:	1,340.1
Estimated world total <sup>16/</sup>	3,640.0:	3,920.0:	3,790.0:	3,800.0:	3,720.0

<sup>1/</sup> For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. <sup>2/</sup> Preliminary. <sup>3/</sup> Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and El Salvador. <sup>4/</sup> Includes Southern Dobrudja with Bulgaria and excludes it from Rumania for these years. <sup>5/</sup> Data for years 1945 and 1946 not comparable with prewar and 1947. <sup>6/</sup> Includes estimates for countries producing 2 million pounds or less, namely Austria, Belgium, Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. <sup>7/</sup> Includes China Proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkestan). <sup>8/</sup> Includes estimates for Cyprus, Palestine, Trans-Jordan and Outer Mongolia. <sup>9/</sup> Based on estimates of the Buenos Aires Branch, First National Bank of Boston. <sup>10/</sup> Estimates based largely on production in Rio Grande do Sul, which produces about 80 percent of the total. <sup>11/</sup> Based on surveys of the Junta Nacional de la Industria Lanar. <sup>12/</sup> Estimates of the Camara Mercantil de Productos del Pais (Mercantile Exchange of Uruguay). <sup>13/</sup> Includes relatively small production in Bolivia, Colombia, Ecuador, Falkland Islands, Paraguay and Venezuela. <sup>14/</sup> Union of South Africa, Union Protectorates and South West Africa. <sup>15/</sup> Includes estimates for Kenya, French West Africa and Togo and Libya. <sup>16/</sup> Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, and other information. Estimates for countries having changed boundaries have been adjusted to prewar boundaries except as noted.

This is one of a series of regularly scheduled reports on world agricultural production, approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C.M. Purves, Floyd E. Davis, Esther H. Johnson, Anna A. Jones, and Constance H. Farnworth.

